

Approve Vaccine Order

Local health jurisdiction staff approve and submit provider vaccine orders using the Approve Orders function.

Process to review and approve orders:

- 1) Using the Navigation Menu, click on the **Orders/Transfers Menu Heading**. Click *Approve Orders* under the menu.
- 2) Open orders in the **Reviewed for Approval** section (orders with status of *In Manual Review*) to review exception reason(s) and approve:
 1. Click the desired Order Number to open the order details.
NOTE: *The orders are automatically sorted by PIN, then Date.*
 2. Verify that the **Doses Used Last Month** and **Physical Inventory** are entered for all vaccine products, and enter any missing information.
 3. Verify that the **Order Quantity** is appropriate. Use your Recommended Order Quantity Calculation Guidelines or Calculator to determine the appropriate order quantity based on the provider's order frequency.
 4. Change the **Order Quantities** if needed as described below.
 5. Review exception reason(s) if present. See page 2 for more information on exception reasons.
 6. To approve: Click the **Approve** button to save changes and exit the order details. You may need to scroll to the right to see the **Approve** button. The **Order Status** changes to *Pending Local Approval* and moves to the **Ready for LHJ Approval** section.
 7. To leave for later approval: Click the **Cancel** button to exit the order details. Any changes will not be saved. The order stays in the **Reviewed for Approval** section. You can open the order to approve, change or deny at any time.
 8. To Deny the entire order: See page 2.
- 3) Open orders in the **Ready for LHJ Approval** section (orders with status of *Pending Local Approval*) for further review and submit to the state:
 1. Click the desired Order Number to open the order details.
 2. Review, and change or deny the order if needed as described below.

3. Click the **Approve** button to save any changes and exit the order details.
4. Click the **Cancel** button to exit the order details without saving changes.
5. Check the checkbox next to the order number to select individual orders, or click the **Select All** button to select all the orders in the Ready for LHJ Approval section.
6. Click the **Send to State** button. The orders are submitted to the state and will leave the local approver queue.

To make changes to orders:

(Orders under **Reviewed for Approval** or **Ready for LHJ Approval** sections)

To ADD a vaccine to an order:

1. Locate the vaccine under the **Optionally add vaccines to order by changing order quantity** section.
2. Enter values in the **Dose Used Last Month** and **Physical Inventory** fields.
3. Enter the desired quantity in both the **Order Quantity** and **Approved Quantity** fields. The values must be equal.
4. Explain why the vaccines were added in the **Comment** field.
5. Repeat for each vaccine being added to the order.
6. Click the **Approve** button when finished.

Important: *The values in the **Approved Quantity + Backordered Quantity + Denied Quantity** fields must equal the value in the **Order Quantity** field for each vaccine.*

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To **INCREASE** the order quantity of a vaccine in the order:

1. Enter the new (higher) quantity in both the **Order Quantity** and **Approved Quantity** fields. The order and approved quantities must be equal.
2. Explain why the vaccines were increased in the **Comment** field.
3. Repeat for each vaccine to increase the order quantity.
4. Click the **Approve** button when finished.

To **DECREASE (Deny)** the order quantity of a vaccine in the order:

1. Enter the new (lower) quantity in the **Approved Quantity** field.
2. **Do not change** the original **Order Quantity**.
3. Enter the amount of vaccine being denied in the **Denied Quantity** field. The **Approved Quantities** + the **Denied Quantity** must equal the original **Order Quantity**.
4. Select a **Denial Reason** from the drop down menu.
5. Explain the vaccine denial/decrease in the **Comment** field.
6. Repeat for each vaccine to decrease (deny) the order quantity.
7. Click the **Approve** button.

To **DENY** an **entire order** so none of the requested vaccines are ordered:

1. Select an **Entire Order Denial Reason** from the drop down menu at the bottom of the page.
2. Click the **Deny Order** button.

To **BACKORDER** a vaccine or entire order: Orders or vaccines backordered are not tracked or processed by the state. See the Approve Order User Guide for important information about using this function. Backorders can be found on the Approve Order page listed under the Backordered section.

URGENT order requests: Urgent orders should be pre-approved by the LHJ. Providers can then request that individual vaccines be processed as Urgent in the Immunization Information System. Review the **Priority Reason** when deciding to approve or deny an urgent order request.

- a. To **approve** an urgent request, leave the Urgent checkbox checked.
- b. To **deny** an urgent request, uncheck the Urgent checkbox. Explain why the request was denied in the **Comment** field.
- c. To **mark an order** urgent, select a **Priority Reason** from the dropdown menu.

Exception reasons: The **Exception Reason** shows whether the order is outside the provider's assigned frequency, timing, recommended order quantity, allocation or is urgent. Orders can have more than one exception reason.

Exception reason	What it means
Outside Assigned Order Timing	The whole order is placed outside the provider's assigned half of the month (1 st -15 th or 16 th -end of month).
Outside Assigned Order Schedule	The whole order is placed in a month that is not part of the provider's schedule.
Outside Recommended Order Quantity	The order quantity of a specified vaccine is more or less than the provider's recommended quantity based on their order history.
Outside of allocation range	The order quantity of a specified vaccine is more than the provider's allocation.
Shipping Information Change	The provider's shipping information has changed.
Urgent	The provider requests priority processing for specified vaccines.